Listing of Claims

1.   (Currently Amended) A method for automated management and standardization of ~~non-~~
public performance information associated with at least one business comprising:

~~obtaining~~ receiving a trial balance report from a contributing business as an electronic

data file, the trial balance containing performance information associated with ~~a~~ the contributing

business, the performance information originating from ~~an~~ financial accounting system used by

the contributing business to maintain its accounting records~~,~~; ~~and~~

storing the trial balance report as electronic data on a data processing system, the

performance information in the trial balance report having a first format based on a first set of

performance classifications;

converting, using an automated process executing on the data processing system,

the performance information in the trial balance report from the first format to a second

standardized format based at least in part on a conversion map associated with the contributing

business, the conversion map defining a correspondence between one or more performance

classifications of the first set of performance classifications and one or more respective

performance classifications of a second set of standardized performance classifications;

aggregating the converted performance information with performance information

associated with at least one other business, thereby creating a standardized database of private

company performance information;

analyzing the converted performance information associated with the contributing

business based at least in part on one or more performance metrics;

generating at least one electronic report based on ~~the~~ results of the analyzing ~~for~~

~~the business whose performance information was obtained~~; and

automatically providing at least a portion of the at least one electronic report to at least one requesting party.

2.   Cancelled.

3.   (Currently Amended) The method as in Claim 1, wherein the at least one electronic report includes at least one alert indicator to identify at least one performance metric of the converted performance information having a variance from a corresponding predetermined value specified by the at least one recipient that exceeds an adjustable threshold associated with the at least one performance metric.

4.   (Original) The method as in Claim 3, wherein the predetermined value includes a value of the performance metric from a previous period.

5.   (Currently Amended) The method as in Claim 3, wherein the predetermined value includes a target value set for the at least one performance metric.

6.   (Original) The method as in Claim 3, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

7.   (Currently Amended) The method as in Claim 1, further comprising the steps of:

obtaining receiving a trial balance from a second contributing business as an electronic data file, the report trial balance containing performance information associated with a second contributing business, the performance information having a third format based on a third set of performance classifications;

converting, using an automated process, the performance information associated with the second business from the third format to the second format based at least in part on a conversion map defining a correspondence between one or more performance classifications of the third set

of performance classifications and one or more respective performance classifications of the

second set of performance classifications;

aggregating the converted performance information associated with the second

contributing business with the other aggregated performance information; and

analyzing the converted performance information associated with the second business

based at least in part on one or more performance metrics.

8.   (Previously Presented) The method as in Claim 7, further comprising:

generating at least one electronic report based on results of the analysis of the converted

performance information associated with the second business.

9.   (Previously Presented) The method as in Claim 7, further comprising:

analyzing at least one performance metric of at least one of the first and second

businesses based on one or more representative performance metrics from the aggregated

converted performance information.

10.   (Currently Amended) The method as in Claim 1, wherein obtaining the trial balance

includes receiving the performance information as one or more data files uploaded by an agent of

the contributing business via a website.

11.   Cancelled.

12.   (Currently Amended) The method as in Claim 1, wherein the at least one electronic

report is provided received from the contributing business via a website.

13.   (Original) The method as in Claim 1, wherein the conversion of the performance

information from the first format to the second format is performed at least in part using one or

more software programs.

14.   Cancelled.

15. (Currently Amended) The method as in Claim 1, wherein the contributing business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

16. (Previously Presented) The method as in Claim 1, further comprising:

providing at least one alert to the at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric set by the requesting party.

17. (Original) The method as in Claim 16, wherein the predetermined value includes a value of the performance metric from a previous period.

18. (Original) The method as in Claim 16, wherein the predetermined value includes a target value set for the at least one performance metric.

19. (Original) The method as in Claim 16, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

20. (Original) The method as in Claim 16, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

21. (Previously Presented) The method as in Claim 1, further comprising:

delivering at least a portion of the converted performance information to a requesting party as one or more data files having a format compatible with software operated by the at least one requesting party.

22. (Original) The method as in Claim 1, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance

classifications of the second set includes a financial account correlated to a financial account of the first set.

23.   (Original) The method as in Claim 1, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

24.   (Currently Amended) A method for automated management of performance information associated with at least one non-public business, the method comprising:

obtaining receiving a trial balance report at a remote data processing system as an electronic data filed uploaded by an agent of a submitting business via a graphical user interface (GUI), the trial balance report containing performance information associated with a the submitting business, the performance information originating from an accounting system used by the submitting business to maintain its accounting records and including financial performance information associated with the submitting business, as an electronic data file uploaded via a graphical user interface (GUI), the performance information in the trial balance report having a first format based on a first set of performance classifications;

automatically selecting at least one automated software program for the performance information associated with the business with the data processing system;

converting, using at least one automated software program executing on the data processing system, the performance information in the trial balance report from the first format to a second standardized format based at least in part on a mapping between one or more

performance classifications of the first set of performance classifications and one or more

corresponding performance classifications of a second set of performance classifications;

aggregating the converted performance information with performance information

associated with at least one other business, thereby creating a standardized database of private

company performance information;

analyzing, using at least one automated software program ~~associated with the GUI~~executing on the data server, the converted performance information based at least in part on

one or more performance metrics;

creating at least one performance report based on results of the analysis of the converted

performance information ~~via the GUI~~with the data server; and

providing the at least one performance report to at least one requesting party via the GUI.

25.   (Currently Amended) The method as in Claim 24, wherein the GUI includes one or more

webpages of a website and the data processing system includes at least one webserver associated

with the website.

26.   Cancelled.

27.   (Currently Amended) The method as in Claim 24, wherein the submitting business is one

of a group consisting of: a private business; a public business; a non-profit organization; and a

government agency.

28.   (Previously Presented) The method as in Claim 24, further comprising:

providing a least one alert to the at least one requesting party via the website, the alert

identifying at least one performance metric of the converted performance information having a

variance from a corresponding predetermined value that exceeds an adjustable threshold

associated with the at least one performance metric set by the requesting party.

29.   (Original) The method as in Claim 28, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

30.   (Currently Amended) The method as in Claim ~~24~~25, further comprising:

delivering at least a portion of the converted performance information to at least one requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

31.   (Original) The method as in Claim 24, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

32.   (Original) The method as in Claim 24, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

33.   (Currently Amended) A network-based performance information management system for automated management of performance information associated with at least one ~~private~~ non-public business, the system comprising:

a performance information receipt module that receives performance information uploads from a submitting business in the form of an electronic data file containing a trial balance report taken from the submitting business's general ledger accounting system~~business performance~~

~~information associated with a business~~, the performance information having a first format based

on a first set of performance classifications;

a mapping module, including a map database, that converts the performance information

from the first format to a second standardized format based at least in part on a mapping between

one or more performance classifications of the first set of performance classifications and one or

more performance classifications of a second set of performance classifications, the mapping

maintained in the map database;

a database module for storing the converted information with information associated with

at least one <u>submitting business with other aggregated performance information associated with</u>

other business<u>es</u> thereby creating a standardized database of private company performance

information<u>;</u>

an analysis module for analyzing the converted performance information based at least in

part on one or more performance metrics; and

a performance report/alert generation module for generating at least one performance

report based on results of the analysis module, the performance report/alert generation module

providing the at least one performance report to at least one requesting party.

34.   Cancelled.

35.   (Currently Amended) The system as in Claim 33, wherein the at least one performance

report includes at least one alert indicator to identify at least one performance metric of the

converted performance information having a variance from a corresponding predetermined value

that exceeds an adjustable threshold associated with the performance metric.

36.   (Currently Amended) The system as in Claim ~~33~~<u>35</u>, wherein the predetermined value

includes a value of the performance metric from a previous period.

37.   (Currently Amended) The system as in Claim 33~~33~~35, wherein the predetermined value

includes a target value set for the performance metric.

38.   (Currently Amended) The system as in Claim 33~~33~~35, wherein the predetermined value

includes a value representative of an industry average for the performance metric.

39.   (Currently Amended) The system as in Claim 33, further comprising:

the performance information receipt module receiving a trial balance report containing

performance information associated with a second <u>submitting</u> business, the performance

information having a third format based on a third set of performance classifications;

the mapping module converting the performance information associated with the second

<u>submitting</u> business from the third format to the second format based at least in part on a

conversion map defining a correspondence between one or more performance classifications of

the third set of performance classifications and one or more respective performance

classifications of the second set of performance classifications;

the database module aggregating the converted performance information associated with

the second <u>submitting</u> business with the other aggregated performance information; and

the analysis module analyzing the converted performance information associated with the

second <u>submitting</u> business.

40.   (Currently Amended) The system as in Claim 39, the performance report/alert generation

module generating one or more performance reports based on results the analysis of the

converted performance information associated with the second <u>submitting</u> business.

41.   (Currently Amended) The system as in Claim 39, the database module aggregating the

converted performance information associated with the ~~first and second~~ <u>submitting</u> businesses;

and

the analysis module analyzing a performance of at least one of the ~~first and second~~ submitting businesses based on one or more representative performance metrics from the aggregated converted performance information.

42.   (Previously Presented) The system as in Claim 33, wherein the performance report/alert generation module includes a website adapted to receive the performance information as one or more uploaded data files.

43.   Cancelled.

44.   (Previously Presented) The system as in Claim 33, wherein the performance report/alert generation module includes a website adapted to provide the one or more performance reports as one or more webpages.

45.   Cancelled.

46.   (Currently Amended) The system as in Claim 33, wherein the submitting business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

47.   (Currently Amended) The system as in Claim 33, the performance report/alert generation module further ~~comprising~~ providing at least one alert to at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.

48.   (Original) The system as in Claim 47, wherein the predetermined value includes a value of the performance metric from a previous period.

49.   (Original) The system as in Claim 47, wherein the predetermined value includes a target value set for the at least one performance metric.

50.   (Original) The system as in Claim 47, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

51.   (Original) The system as in Claim 47, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

52.   (Previously Presented) The system as in Claim 33, the performance report/alert generation module delivering at least a portion of the converted performance information to the at least one requesting party as one or more data files having a format compatible with software operated by the requesting party.

53.   (Original) The system as in Claim 33, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

54.   (Original) The system as in Claim 33, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

55.   (Currently Amended) A system for automated management of non-public performance information associated with at least one business, the system comprising:

    one or more networked servers adapted to:

        operate a website having one or more webpages;

~~obtain~~ receive a trial balance report, as an electronic data file uploaded via one or more webpages of the website, from a submitting business containing performance information associated with ~~a~~ the submitting business, and including financial performance information of that business originating from a general ledger accounting system used by the business to maintain its accounting records, ~~as an electronic data file uploaded via one or more webpages of the website,~~ the performance information having a first format based on a first set of performance classifications;

convert the performance information from the first format to a second standardized format based at least in part on a conversion map that maps a correlation between one or more performance classifications of the first set of performance classifications and one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information with performance information associated with at least one other business to create a standardized database of private company performance information ~~across a receiving institution's financial portfolio that comports with generally accepted accounting principles~~;

analyze the converted performance information based at least in part on one or more performance metrics; and

provide one or more performance reports of results of the analysis of the converted performance information for display to at least one requesting party ~~via the one or more webpages of the website~~.

56.   Cancelled.

57.   (Currently Amended) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

~~obtain~~ receive a trial balance report containing performance information associated with a second submitting business as an electronic data file uploaded via one or more webpages of the website, the performance information associated with the second submitting business having a third format based on a third set of performance classifications;

convert the performance information associated with the second business from the third format to the second format based at least in part on a conversion map that maps a correlation between one or more performance classifications of the third set of performance classifications and one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information associated with the second submitting business with the other aggregated performance information; ~~and~~

analyze the converted performance information associated with the second submitting business based at least in part on one or more performance metrics; and

provide for the display of one or more performance reports of results of the analysis of the converted performance information associated with the second submitting business via the one or more webpages of the website for the second submitting business.

58.   (Currently Amended) The system as in Claim 55, wherein the submitting business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

59.   (Previously Presented) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

provide a least one alert to at least one requesting party via the website, the alert identifying at least one performance metric of the converted performance information having a

variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.

60.   (Original) The system as in Claim 59, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

61.   (Original) The method as in Claim 55, wherein the one or more networked servers are further adapted to:

deliver at least a portion of the converted performance information to a requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

62.   (Original) The system as in Claim 55, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

63.   (Original) The system as in Claim 55, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

64.-99.   Cancelled.

100.   (Currently Amended) A method for automated management of private company performance information comprising:

~~obtaining~~ receiving a trial balance as an electronic data file upload, the trial balance containing performance information associated with a private business, the trial balance comprising data taken from that business' general ledger accounting system and having a user-defined format based on a first set of performance classifications corresponding to a set of financial accounts;

converting, using an automated process executing on a data processing system, the performance information contained in the trial balance from the user-defined format to a standardized format based at least in part on a mapping process that correlates one or more one or more performance classifications of the first set of performance classifications and one or more respective performance classifications of a second set of standardized performance classifications;

aggregating the converted performance information with performance information associated with at least one other business thereby creating a standardized database of private company performance information ~~across a receiving entity's financial portfolio that comports with generally accepted accounting principles~~;

analyzing the converted performance information based at least in part on one or more performance metrics; and

generating at least one electronic report based on the analyzing, wherein generating a report comprises generating a web page based analysis dashboard for visualizing results of the analyzing, the dashboard detailing at least one historical trend for one or more performance metrics associated with the business for the private business~~; and~~

~~automatically providing the at least one electronic report to at least one requesting party~~.

101.   (Currently Amended) A network-based business performance information management system comprising:

a computer system accessible on a computer network and adapted to:

electronically receive at least one business performance information file from at least one submitting business, the business performance information file containing financial statement information on from the submitting businesses general ledger accounting system, the at least one business financial statement information in first format specified by that business based on a first set of performance classifications corresponding to a set of financial accounts;

convert the information in the at least one business performance information file into a standardized format using a mapping process based on a conversion map that maps one or more performance classifications of the first set of performance classifications and a second set of standardized performance classifications;

aggregate the information with converted business performance information of at least one other submitting business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;

analyze the converted performance information based at least in part on one or more performance metrics; and

generate an alert if results of analyzing indicates that at least one performance metric of the converted performance information varies from a corresponding predetermined value by more than an adjustable threshold set by a recipient of the alert.

102.   (Currently Amended) A method for gathering private company business performance information comprising:

electronically receiving a file containing trial balance information at a remote computer

system over the Internet, the trial balance information in a first format based on a first set of

performance classifications corresponding to a set of financial accounts, the trial balance

information associated with a submitting business and taken from that submitting business's

general ledger accounting system~~at a remote computer system over the Internet~~;

converting the data in the file from the first format to a second standardized format using

an automated conversion mapping process that correlates one or more one or more performance

classifications of the first set of performance classifications and one or more respective

performance classifications of a second set of standardized performance classifications;

aggregating the converted data in a database with converted data of other private

companies thereby creating a standardized database of private company performance information

~~across a receiving entity's financial portfolio that comports with generally accepted accounting~~

~~principles~~; and

analyzing the converted performance information based at least in part on one or more

performance metrics;

generating at least one report based on the results of analyzing for the submitting

business; and

~~automatically~~ providing the at least one report to at least one requesting party upon

request.